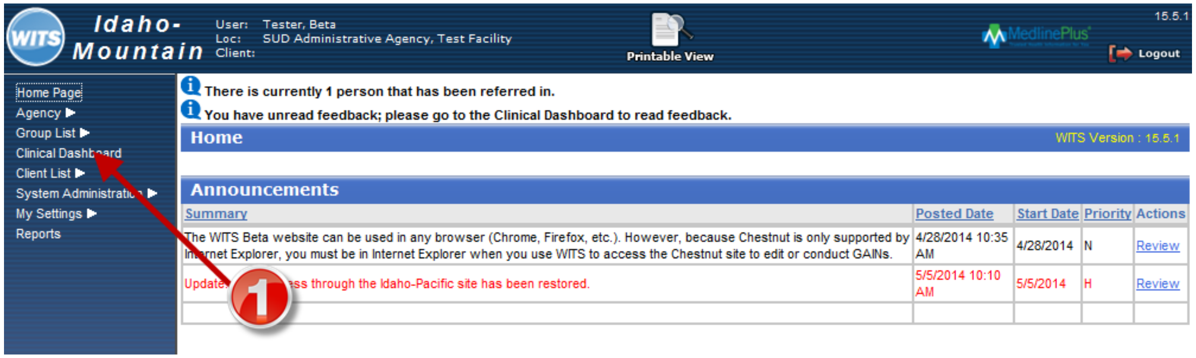
Clinical Dashboard for a Clinical Supervisor

Purpose

The Clinical Dashboard allows staff members to view their caseloads and to view the caseloads for the staff they supervisor. Clinical Supervisors may also provide feedback to staff. All feedback is stored and tracked over time.

Locate the Clinical Dashboard

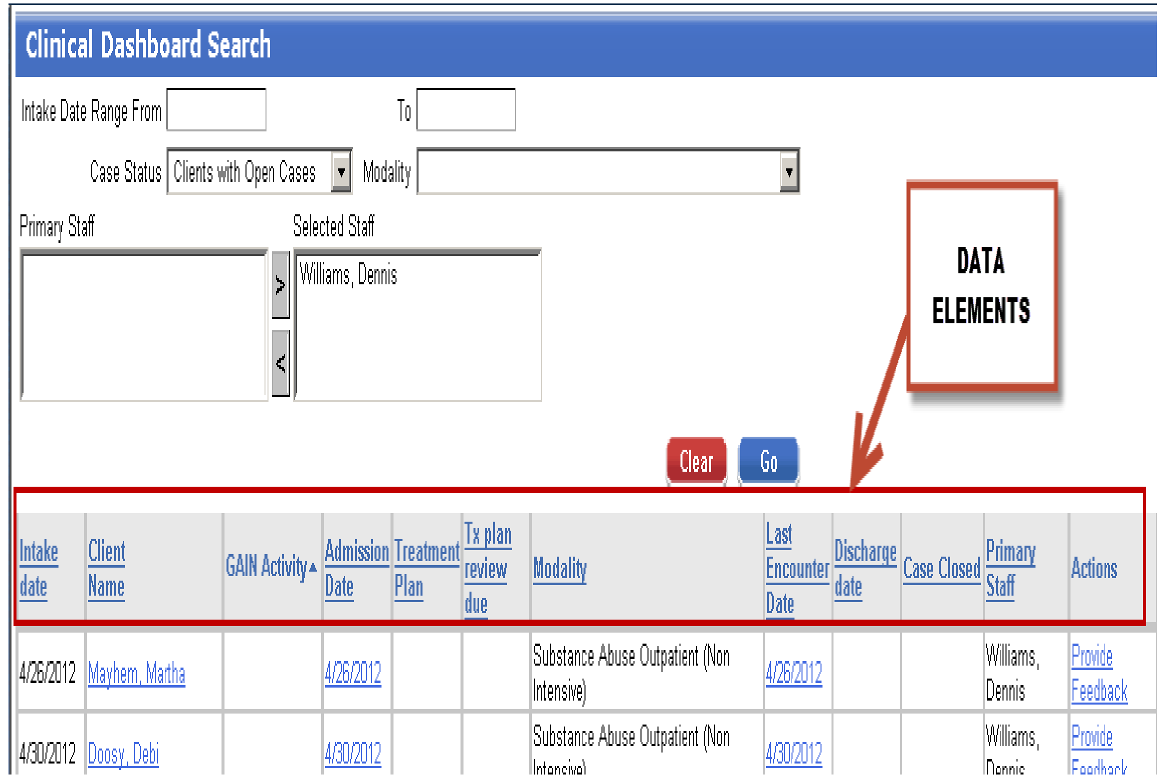
1. **Getting here:** The Clinical Dashboard is located on the navigation bar between the Group List and Client List.



Data Elements on the Clinical Dashboard

There are eleven (11) data elements for each episode of care:

- Intake Date: This is the intake date of the specified episode of care.
- Client Name: This is the clients name as it appears on the Client Profile.
- GAIN Activity: This reflects the date of the GRRS download into WITS in the specified episode of care.
- Admission Date: This is the Admission date for the specified episode of care.
- Treatment Plan: This reflects the last Treatment Plan Start Date where the Tx Plan Status is “Active-Signed Off” or “Active-Note Signed Off” in the specified episode of care.
- Tx plan review due: This reflects the most current Tx Plan Review Due date for the specified episode of care.
- Modality: This reflects the treatment Modalities associated to the Program Enrollments that the client is enrolled in the selected episode of care.
- Last Encounter Date: This reflects the Start Date of the last Encounter Note in the specified episode of care.
- Discharge date: This reflects the Discharge Date if a Discharge has been complete on the specified episode of care.
- Case Closed: This reflects the Case Closed Date if the episode of care is closed.
- Primary Staff: This reflects the staff that has been designated as the primary staff on the specified episode of care based on the hierarchy of Primary Staff Set-up.



Viewing an Individual Client Record & Providing Feedback

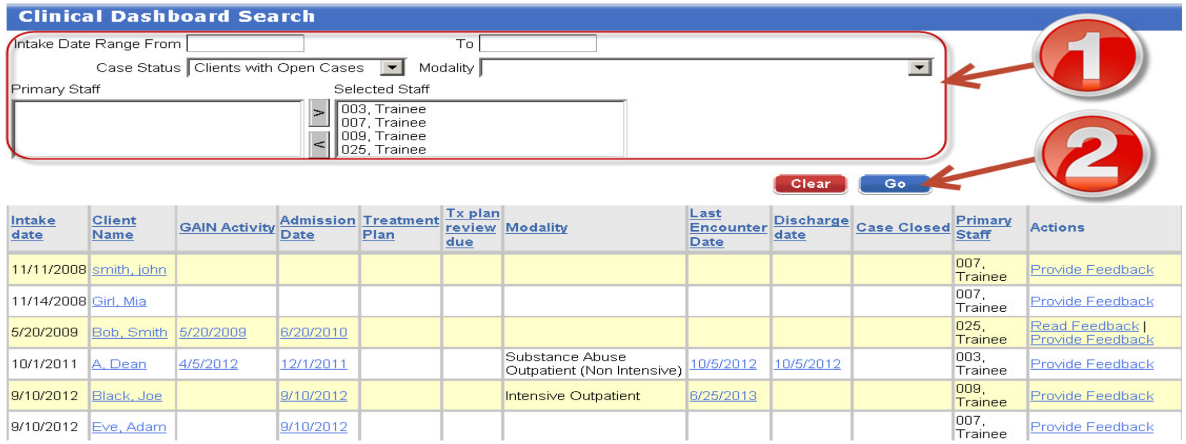
***NOTE:* Only Clinical Supervisors may view the caseload for other agency staff.**

1. Narrow the records to review on the Clinical Dashboard by entering **Intake Date Range From** and **To** fields, **Case Status** and **Modality** and **Selected Staff**.

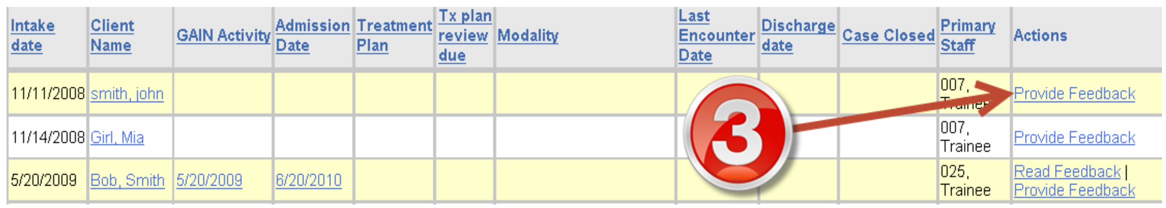
2. Click **Go**.

***NOTE:* Client activities highlighted in blue serve as a link that can be used to quickly navigate to that specific activity. Client activities highlighted in red are past due. Client activities highlighted in yellow have unread Feedback.**

3. Click **Provide Feedback** in the Actions column for the client record.



Intake date	Client Name	GAIN Activity	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff	Actions
11/11/2008	smith, john									007, Trainee	Provide Feedback
11/14/2008	Girl, Mia									007, Trainee	Provide Feedback
5/20/2009	Bob, Smith	5/20/2009	6/20/2010							025, Trainee	Read Feedback | Provide Feedback
10/1/2011	A, Dean	4/5/2012	12/1/2011			Substance Abuse Outpatient (Non Intensive)	10/5/2012	10/5/2012		003, Trainee	Provide Feedback
9/10/2012	Black, Joe		9/10/2012			Intensive Outpatient	6/25/2013			009, Trainee	Provide Feedback
9/10/2012	Eve, Adam		9/10/2012							007, Trainee	Provide Feedback

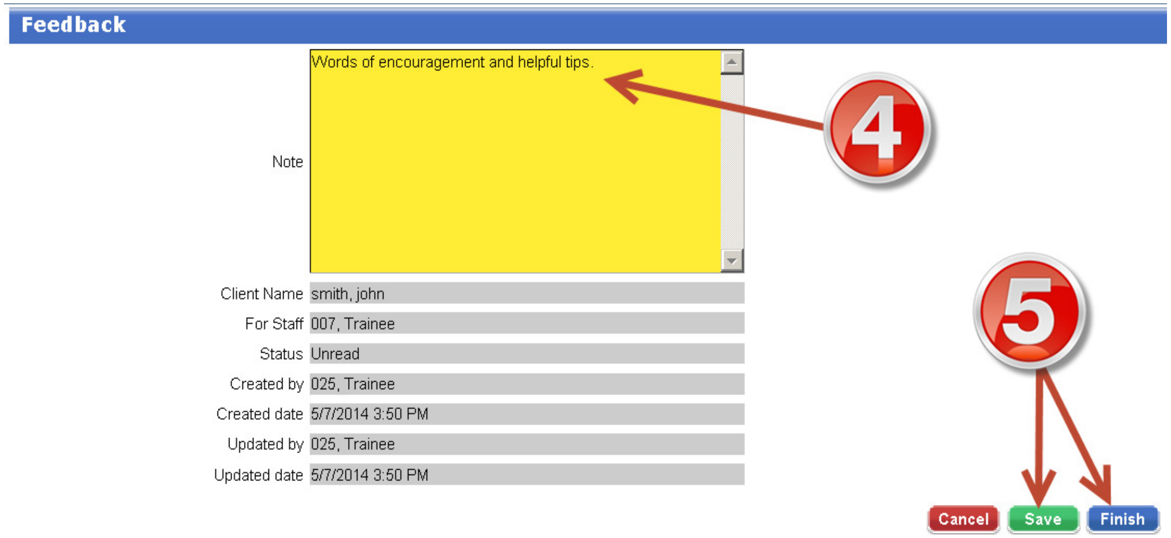


Intake date	Client Name	GAIN Activity	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff	Actions
11/11/2008	smith, john									007, Trainee	Provide Feedback
11/14/2008	Girl, Mia									007, Trainee	Provide Feedback
5/20/2009	Bob, Smith	5/20/2009	6/20/2010							025, Trainee	Read Feedback | Provide Feedback

4. Enter **Feedback** (in the Note field).

5. Click **Save** and **Finish**.

NOTE: **The *Feedback screen allows the supervisor to provide clinical feedback at a client specific level, outside of the client record. It also allows the supervisor to track the date and time when they provided the feedback as well as allowing them to see if the feedback has been read by the clinician. When feedback is provided, the clinician will receive an Email letting them know that new feedback is available. Any client that has unread feedback will also appear in light yellow on the Clinical Dashboard Search screen.***



Viewing the Feedback Summary Report

1. Click **View Feedback Summary** in the Administrative Actions box at the bottom of the Clinical Dashboard.

2. Enter the **Feedback Start Date**.

3. Edit the **Selected Staff** if necessary.

4. Click **On Screen**.

NOTE: Hold the CTRL key on your keyboard down while clicking On Screen to bypass web browser security blocks. The Feedback Summary Report opens in a separate screen in PDF format.